Self-Serve Utility- Employee Merge AQ

Overview

Updated 04/28/2021

The Employee Merge AQ is used to combine duplicated employee records. Since this AQ modifies data, it can only be run by users with Admin Tools access to increase security.

If an employee has two records in Avionté, they can be merged into one record. Merging the records will combine all historical documents for that employee, including tax history, paycheck history, etc. into one of the two records. When using the Employee Merge utility, the system combines information from the "Good" and "Bad" record IDs. If information differs on the two records, the system will use the data from the Good record. If data exists in the Bad record that is not found in the Good record, the AQ will combine that data with the Good records by bringing it over into the merged record.

The "Good" record with the correct and complete historical information will retain its current status as "Active" under the employee's name. The "Bad" record with the incorrect or incomplete data will be set to a status of "Purged" and the name will appear as "FirstName zzzLastName."

 Note: *Use caution when merging employee records. This process cannot easily be reversed. **Un-merging records will cost 3 hours of billable time.***
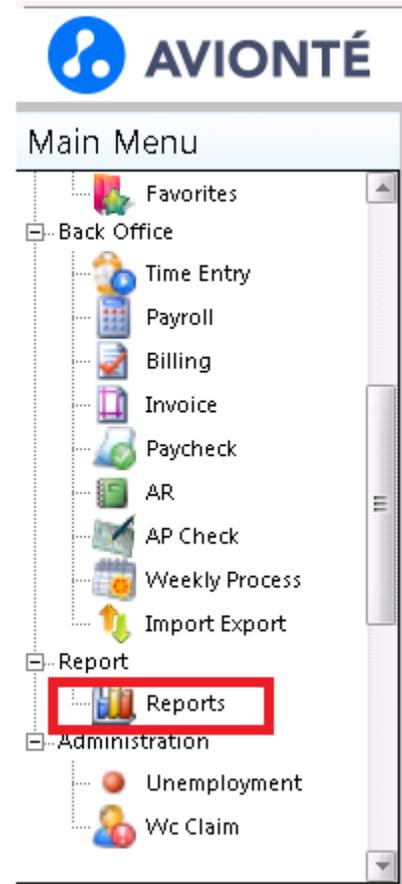
Instructions

To use the Employee Merge AQ:

It's recommended to remove the SSN from the Bad record first.
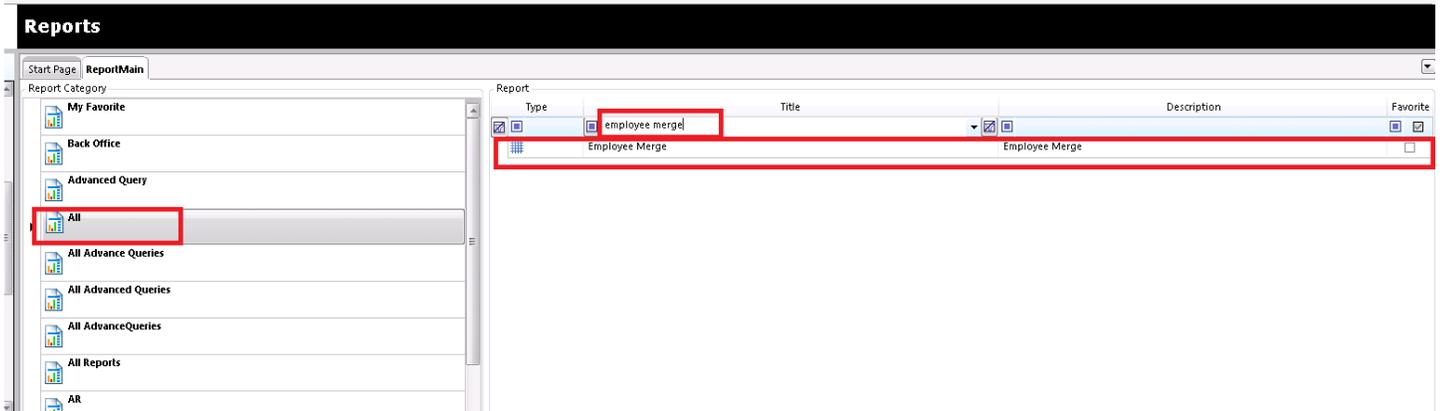
Otherwise, you may get some 'Duplicate SSN' Error messages and, depending on your permissions, you might not be able to view the Purged/Deleted records.

1. Navigate to Reports in the Avionté Main Menu.

2. Scroll in the Category pane to select the Category of Self-Serve Utilities or Search All Reports.
    1. Search for 'Employee Merge'

3. Double click on Employee Merge to open the AQ.

4. Input the desired parameters. See the table below for details.

5. Ensure Test Phase is selected in the Merge Phase parameter and click Run Query.

Merge Reason	
Merge Phase	Test Phase
Certifications	True

6. Review any errors returned in the results.
    1. Errors typically involve setup of the AQ or discrepancies in data on the two records.
    2. If errors are populated, they must be resolved before the merge process can proceed.
    3. If no errors are returned, move to step 7.

Drag a column header here to group by that column.

Message	Sele
Test Phase Successfully Completed!	☑

7. Change the Merge Phase to Backup Phase and Run Query again.

Merge Reason	
Merge Phase	Backup Phase
Certifications	True

8. Repeat step 6 to check for errors.
    1. If no errors are returned, moved to step 9.

Drag a column header here to group by that column.

Message	Sele
Backup Phase Successfully Completed!	☑

9. Change the Merge Phase to Commit Phase.

Merge Reason	
Merge Phase	Commit Phase
Certifications	True

    1. After this phase, the merge is official.

Drag a column header here to group by that column.

Message	Sele
Commit Phase Successfully Completed!	☑

2. The Bad record will be Deleted and the Good record will be set to Active.
   1. The Record Type will be changed to 'Purged'
   2. zzz will be added to the last name of the Bad record

Parameters

Parameter	Description
Good Employee ID	The record with the most accurate, recent, or complete information, which will remain Active and intact
Bad Employee ID	The record with incorrect or incomplete information, which will be Deleted after merging is complete
Merge Reason	Free text field for the user to indicate why the records are being combined
Merge Phase	The three phases used to complete the merge process. See Steps 5-9 for further details. • **Test Phase** - The first phase of the merging process that checks for errors. • **Backup Phase** - The second phase of the merging process that backs up data and contains additional error handling. • **Commit Phase** - The final phase of the merge process that completes the merge. After this phase, the merge is official. The Bad record will be Deleted and the Good record will be set to Active.
Certifications Criminal History Education EEO Employment Category Interviews Past Jobs Professional Summary Requirements Schedules Skills Tests Unemployment WcClaims Contact Methods Documents Edocuments Extras Messages Everify Proveit	These parameters allow users to indicate whether or not data from the corresponding Employee sub-menu will be copied over in the merge. Best practice is to keep all parameters set to True • True - Include data from this sub-menu in the merge • False - Ignore data from this sub-menu will not be brought over in the merge process

Best Practices

After an Employee Merge is successfully run, the "Good" record with the correct and complete historical information will retain its current status as "Active" under the employee's name. The "Bad" record with the incorrect or incomplete data will be set to a status of "Deleted" and the name will appear as "FirstName zzzLastName."

It is best practice to have at least two users who have access to Purged records in your database in case you need to access the "Bad" record again. You can configure access to Purged records through the Config Option - EmployeeRecordTypeProperty.

It is also encouraged to remove the SSN from the "Bad" record **before** the merge. This allows users to quickly identify which record is no longer in use and stops the "Bad" record from importing into the ACA Companion Application.